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Advertising Age

July 23, 1990

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Ad industry fears falloff

Media look anxiously for yearend turnaround

An Advertising Age roundup

Fears are growing that a "selective" recession hitting some media may spread throughout the ad industry and worsen.

Newspapers, magazines and local TV stations, already hard hit by advertising cutbacks, fear prospects of a fourth quarter without a rebound. Ad agencies and network TV, so far relatively unaffected by the recession, are eyeing the fourth quarter with increasing concern.

Uncertainty is growing, triggered by worsening conditions in the print media.

Magazine ad pages are already 3.3% behind for the first half of 1990 compared with the same period last year *(see related story on Page 32)*. The Newspaper Advertising Bureau, which halved its projection for 1990 revenue gains in April, from the original 5.9% to just 3% to 4%, now says papers will be lucky to do even that well.

In the second quarter, the media's confidence level has ebbed and the fear of a general recession has spread.

The worst fears are at media companies.

"I'd love to think we've bottomed out, but we have no information that tells us that," said Brian Donnelly, president of Gannett Co.'s metro newspapers.

Mr. Donnelly said Gannett's West Coast papers, which had been relatively unaffected until recently, began to show weakness in June.

Gannett last week announced a 6.1% decline in net income for the second quarter, its first such drop in 22 years. It wasn't alone.

Other media companies reporting lower earnings included The New York Times Co., Scripps-Howard, Pulitzer Publishing Co.,

(Continued on Page 46)

LAST MINUTE NEWS

Wendy's changes oil

DUBLIN, Ohio—Wendy's this week is expected to announce a shift to 100% vegetable oil for cooking its french fries. It's been using a blend of animal and vegetable oils. Burger King made a similar announcement last week. Both chains are expected to promote their switches with in-store materials. McDonald's will be the only major hamburger chain not to have switched.

Coors Extra Gold for FCB

GOLDEN, Colo.—Adolph Coors Co. moved the Coors Extra Gold account to Foote, Cone & Belding, Chicago, from GSD&M, Austin, Texas. Coors spent $22 million on Extra Gold ads last year; support has been lower this year in anticipation of a new campaign. GSD&M keeps the Coors brand and Hispanic advertising.

Jhirmack taps Rosenfeld

NEW YORK—Jhirmack, a Playtex Family Products unit, moved back to its original agency, Rosenfeld, Sirowitz, Humphrey & Strauss, after Backer Spielvogel Bates resigned (AA, July 16). Ad spending has been about $8 million, but the brand will be relaunched in early 1991 with a larger budget.

EPB eyes Calif. shop

BETHESDA, Md.—Earle Palmer Brown Cos. is negotiating to buy Franklin & Associates, a San Diego agency with $35 milllion in billings,

(Continued on Page 8)

INSIDE

Tom Bachtell

Bob Stempel takes the wheel at General Motors, but his honeymoon may be brief—after Page 30

Cosmetics: Color it green

Lauder to roll out natural Origins line

By Pat Sloan

NEW YORK—In a radical departure for the cosmetics industry, Estee Lauder Cos. will become the first major U.S. beauty company to bring natural, non-animal-tested products packaged in recyclable containers into department stores.

Estee Lauder is launching a new corporate division called Origins Natural Resources and next month will start marketing skincare, body products, aromatherapy and makeup under the Origins name.

It's the fifth major cosmetics unit for Estee Lauder Cos. The others are Estee Lauder, Aramis, Clinique and Prescriptives.

In line with the green movement, Origins will even accept empty bottles at the cosmetics counter from consumers who don't have access to recycling programs.

Origins, under development for six years,

(Continued on Page 48)

Doug Goodman

Evelyn Lauder and son, William, get ready for Origins to move into department stores.

Campbell cuts marketing budget

By Judann Dagnoli

Campbell Soup Co. is cutting its marketing budget for the first time in five years and softening its hard line on agency compensation.

Herb Baum, Campbell North America president, said the company's domestic and Canadian marketing budget, which has traditionally risen 15% to 20% annually, is headed 5% downward in fiscal 1991, starting Aug. 1.

"It's partly because of divestitures, but some of it reflects a dramatic push for more productivity," Mr. Baum said, adding that most of the cutbacks "will be in regional marketing spending."

Campbell North America's marketing budget in fiscal 1990 was more than $250 million, according to *Advertising Age* estimates.

"It's partly because of divestitures, but some of it reflects a dramatic push for more productivity."

At the same time, Campbell is revising its agency compensation system formulated only last April.

Under the terms of that incentive compensation system, base compensation for Campbell agencies would be lowered from 15% to a sliding scale that averaged 13% to 14% (AA, April 30).

Sales goals were to be agreed upon at the start of the company's fiscal year, and if the agency met or exceeded those goals the compensation rate would be increased accordingly, but never to exceed 15%.

Campbell agencies considered the system

(Continued on Page 48)

Dentsu talking to U.K. agency P. 2 • **SportsChannel's future cloudy** P. 3 • **Kids ads take a bashing** P. 4

NEWS SUMMARY

■ **Confidence in an economic upturn** any time soon has dwindled, depressing the outlook for significant increases in advertising spending. 1

■ **Estee Lauder** has established an Origins Natural Resources division to market natural beauty products in recyclable containers. 1

■ **Campbell Soup Co.** said it will cut its domestic marketing budget 5% in the fiscal year starting Aug. 1. It will also alter its recently formulated agency compensation system, which the agencies said was unfair. 1

■ **New frozen breakfast foods** are crowding into the $800 million market from Campbell Soup Co., Foodways National and Oscar Mayer Foods Corp. 3

■ **Minute Maid** will tie into the 1992 Olympics with a $130 million integrated marketing program starting this fall from parent Coca-Cola Foods. 3

■ **SportsChannel America** named Jeff Ruhe president-chief operating officer as the struggling cable channel tries to stimulate growth. 3

■ **Consumers Union** launched a broad attack on children's advertising, charging "hidden advertising messages" through school-related activities. It also cited product placement in movies, celebrity endorsements and other "disguised" commercials. 4

■ **European ad spending** will grow faster than U.S. ad expenditures, but there are signs of a U.S. ad resurgence, according to Veronis, Suhler & Associates. 13

■ **Peanut butter M&M's** is the latest flavor extension for M&M/Mars brands. It will start testing on the West Coast in September. 17

■ **Magazine ad pages** for the first half were down 3.9% from a year ago, but revenues were up 1.6%, according to the Publishers Information Bureau. 32

■ **Brandon Tartikoff,** president of NBC Entertainment, has been named chairman of a new NBC Entertainment Group. Warren Littlefield will succeed him. 36

■ **Kimberly-Clark Corp.** will return to the premium segment of the bathroom tissue market next fall with its Kleenex brand. 43

■ **Saatchi & Saatchi** Advertising Worldwide is expanding in Eastern Europe with joint ventures in Hungary, Czechoslovakia and Poland. Yugoslavia is another target for London-based Saatchi. 45

■ **Thrifty Rent-A-Car System** is negotiating to set up outlets adjoining Montgomery Ward & Co. stores, in competition with Budget Rent a Car Corp., which has an agreement with Sears, Roebuck & Co. 47

■ **General Foods USA** is test-marketing Cappio iced cappuccino, which it says will compete with "adult beverages," rather than directly against coffee or soft drinks. 49

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Dentsu eyes Europe through CDP deal

By Laurel Wentz and David Kilburn

Dentsu is discussing a deal with U.K.-based Collett Dickenson Pearce that would give Dentsu much-sought access to a European network.

The world's biggest agency also may be talking about links with other agencies in the U.K. and elsewhere in Europe. Dentsu has said publicly it wants to see faster growth of its relatively small non-Japan business; however, its overall strategy for doing this isn't clear.

If negotiations with CDP are successful, Dentsu would take a large minority stake in CDP's Luxembourg-based international holding company, CDP International, sources say. A deal could be announced this fall.

In Tokyo, Dentsu executives refused to comment on the CDP negotiations or its expansion plans.

CDP Chairman Christopher Stewart-Smith said, "All we've ever confirmed is that we're in regular discussion with them about clients, and I think they have a high regard for us. I believe they have been talking to a number of people."

He said although Tokyo-based Dentsu and London-based CDP currently share only Toyota, they have talked about several other Dentsu clients CDP might handle.

Sources said Dentsu and CDP would later seek a U.S. agency to buy, giving CDP a much-needed U.S. partner.

When CDP in 1988 bought back a 40% stake that Young & Rubicam, New York, held in the agency, CDP executives said they would try to buy a midsize New York agency in a year or two. However, as an independent, CDP has made little progress toward establishing a U.S. link.

In CDP, Dentsu would get not only the U.K.'s No. 11 agency, with 1989 gross income of $39 million from billings of $270 million, but also a collection of continental agencies in which the holding company owns equity or has an affiliation with. The holding company has stakes in or has an affiliation with the Alice agency in France, Grupo Barrio in Spain, Canard in Italy, and agencies in West Germany, the Netherlands, Denmark, Austria, Switzerland and Turkey.

Until now, Dentsu has operated in Europe only through small representation offices in West Germany and Spain that don't create or place advertising. The Spanish office, opened in Barcelona in January 1989, has mainly been involved in sponsorship deals for Japanese advertisers.

In the U.K., two local agencies denied rumors they too are negotiating a closer relationship with Dentsu.

"We work very closely with Dentsu and we share the agency fee on Mazda," said Len Weinreich, executive creative director of Burkitt Weinreich Bryant Clients & Co. "We've done a number of special projects [for Dentsu] from time to time. Dentsu does that with quite a lot of agencies. Because they have so many conflicting clients, they have to have many relationships" outside Japan.

However, his agency's expansion plans involve building a network of independent shops in different countries and have nothing to do with Dentsu, Mr. Weinreich said.

Butterfield Day Devito Hockney also has a relationship with Dentsu on the Honda account, a Dentsu client BDDH handles in the U.K.

"Beyond that, we have no other plans or formal agreements with Dentsu," said Leslie Butterfield, BDDH's chairman and planning director.

Dentsu plans to expand its own DCA Advertising, New York, and recently hired an American, C. Ray Freeman, to be chief operating officer.

It's also part owner of HDM Worldwide, along with Young & Rubicam and Eurocom. □

Seagram axes media unit

$55M in ad buys returns to brand agencies

By Patricia Winters

NEW YORK—The elimination of 177 jobs at Jos. E. Seagram & Sons is benefiting Seagram's ad agencies.

As part of the staff reduction, Seagram last week eliminated its 20-person in-house media buying unit, including VP-Media Allen Goldin, and is moving about $55 million in buying back to its brand agencies.

The bulk of spending went to Ogilvy & Mather, agency for Seagram's name liquors, and DDB Needham Worldwide, agency for premium brands such as Crown Royal and Chivas Regal, a company spokesman said.

Wells, Rich, Greene and the Mingo Group also will buy media for their accounts. Brands handled by WRG include Seagram's Coolers; Mingo is the company's black consumer market agency.

Based on 1989 spending figures compiled by LNA/Arbitron Multi-Media Service, DDB Needham wins $26 million in media buying, O&M receives $17 million and WRG gets $10 million.

The Seagram spokesman said he didn't know how the agencies would be compensated now that they handle both media and creative.

Seagram's overall staff reduction—accounting for about 7.5% of its work force—underscores the trouble that's plagued the liquor industry for more than a decade.

Last year, liquor volume fell 3% to 156 million 9-liter cases, said John C. Maxwell Jr., beverage analyst with Wheat, First Securities.

"The market is down again this year by 4% to 6%, and it will be that way for the foreseeable future," he said. "And if Congress has its way with more taxes, it could be worse."

Seagram isn't the only company with problems. Schieffelin & Somerset Co., a joint venture company between Moet Hennessy and

"With a reduced ad budget, you have to question the long-term merit of an in-house media buying unit."

Guinness, confirmed last week it's axed 14% of its 280-member staff, including marketing and sales positions. The cuts are the first since Schieffelin Co. and Somerset Distilling merged in 1987.

Seagram's media department was created five years ago to save money, but media buying has become labor intensive and more complicated.

Industry observers also note that Seagram's media spending has dropped since the mid-1980s, especially with the decline in wine cooler advertising, and is likely to keep shrinking.

"With a reduced ad budget, you have to question the long-term merit of an in-house media buying unit," said one source close to the company.

Seagram noted there are fewer and fewer wholesale and retail outlets in the industry, and added that the company has only about half of the brands it once had. Seagram last year eliminated most of its mass, unadvertised brands to focus on premium spirits—the industry's one growing area.

Schieffelin took the same tack, concentrating on premium brands like Hennessy cognac, Moet & Chandon champagne, Tanqueray gin and Johnnie Walker scotch.

In the 1980s, the strategy worked; premium segments such as champagne and cognac saw sales growth. But now even those segments, except for imported vodka and some premium varietal wines, are facing tough times.

"We were insulated; we operated with premium brands," said Penn Kavanagh, president-ceo of Schieffelin. "The categories of merchandise we sold were growing, and our business was driven by category growth. Now we don't see growth. . . . we can only look to growing share."

Seagram is the nation's No. 2 liquor company with a 14% share, Mr. Maxwell said. Grand Metropolitan's International Distillers & Vintners, owner of Carillon Importers, Paddington Corp. and Heublein, is No. 1 with an 18.7% share. Schieffelin is ninth with 2.8%. □

Gary Levin contributed to this story.

Ad boom seen for brands, Europe

By Gary Levin and Wayne Walley

NEW YORK—European ad spending will continue to skyrocket, and a renewed focus on brand-building in the U.S. will overshadow the sales promotion boom.

Those are the key findings for the advertising and media businesses in Veronis, Suhler & Associates' annual communications industry forecast, released last week.

This year's report marked the first time the media brokerage company tracked foreign spending, with figures released for seven countries where substantial spending gains of the past several years are expected to continue.

In Spain, Italy, France, West Germany, the U.K., Japan and Canada, measured media advertising totaled $69.8 billion in 1989, up 10.5% from 1988 and approaching U.S. measured media spending of $77.5 billion as tracked by Veronis Suhler. Combined ad spending in those countries has more than doubled since 1980's $29.6 billion total.

Among the seven countries, Spain and Italy have grown the fastest since 1981, with compound annual ad spending growth of 27.4% and 17.4%, respectively. Both will continue strong through 1994, with compound annual growth rates of 25.2% and 10.8%.

Measured media forecasts for the seven countries show that as a percentage of total ad dollars spent, TV will grow to 37.1% by 1994 from 31.5% in 1980, due partly to deregulation and commercialization of foreign networks. Newspapers' share of the advertising pie will decline to 38.3% from 43.2%. Radio's share will drop slightly to 5.9% from 6.6%, and magazines will remain about even at 18.7%.

In the U.S., Veronis Suhler estimated total 1989 advertising and promotion spending at $222.9 billion, a 5.8% increase from 1988—the lowest percentage gain in any of the past five years. Promotion spending rose 6.1% to $98.2 billion, accounting for 44% of the total; measured media spending rose 5.7% to $77.5 billion; and other spending, including direct mail and Yellow Pages, rose 5.7% to $47.2 billion.

Over the past five years, "measured media has really taken its licks in comparison with promotional spending and the economy," said John Suhler, president of the company. "Leveraged buyouts had a dramatic effect on the economy. Advertising and promotional spending were viewed as discretionary during the restructuring."

But Mr. Suhler said early signs of a comeback for "building brand franchises" are appearing as spending cutbacks ease in general image advertising.

"We think advertisers are getting a little jaded with promotional spending," said David Wilkofsky, president of the Wilkofsky Gruen Associates economic consulting company.

The forecast paints a rosy ad revenue picture for U.S. broadcasters, predicting a 6.8% compound annual growth rate for networks and local TV stations from 1989 to 1994.

Network advertising by 1994 will total nearly $12.8 billion, up from $9.3 billion in 1989, reflecting a 6.6% compound annual growth rate that is nearly triple the 2.2% compound growth of the past five years.

"The growth rates of competing media have moderated, and the negatives for network TV are fewer," Mr. Suhler said.

"This is not a plug for network TV, but as it relates to media vehicles, no one has found a more efficient vehicle for mass delivery," Mr. Suhler said, adding that his forecast for more brand-equity advertising in large part will fuel this gain.

Networks won't be the only beneficiaries of increased ad spending, the study said. Local station advertising will grow at a 6.9% compound annual rate, reaching almost $21.2 billion by 1994 compared with $15.2 billion last year.

Veronis Suhler also projected spending on cable TV subscriptions and advertising will grow at the same 8% annual rate to reach $16.5 billion by 1994.

Total cable advertising, the forecast said, will grow to $3 billion by 1994, a 13.7% annual increase that reflects much slower growth than the average annual 23.8% rise of the past five years as cable penetration has increased.

Cable, which Mr. Suhler described as "the darling of our reports for the last 10 years," now has "arithmetic problems. The circulation won't increase as much by new wires. and the big increases are behind us," he said. "We're now down to marginal growth rates."

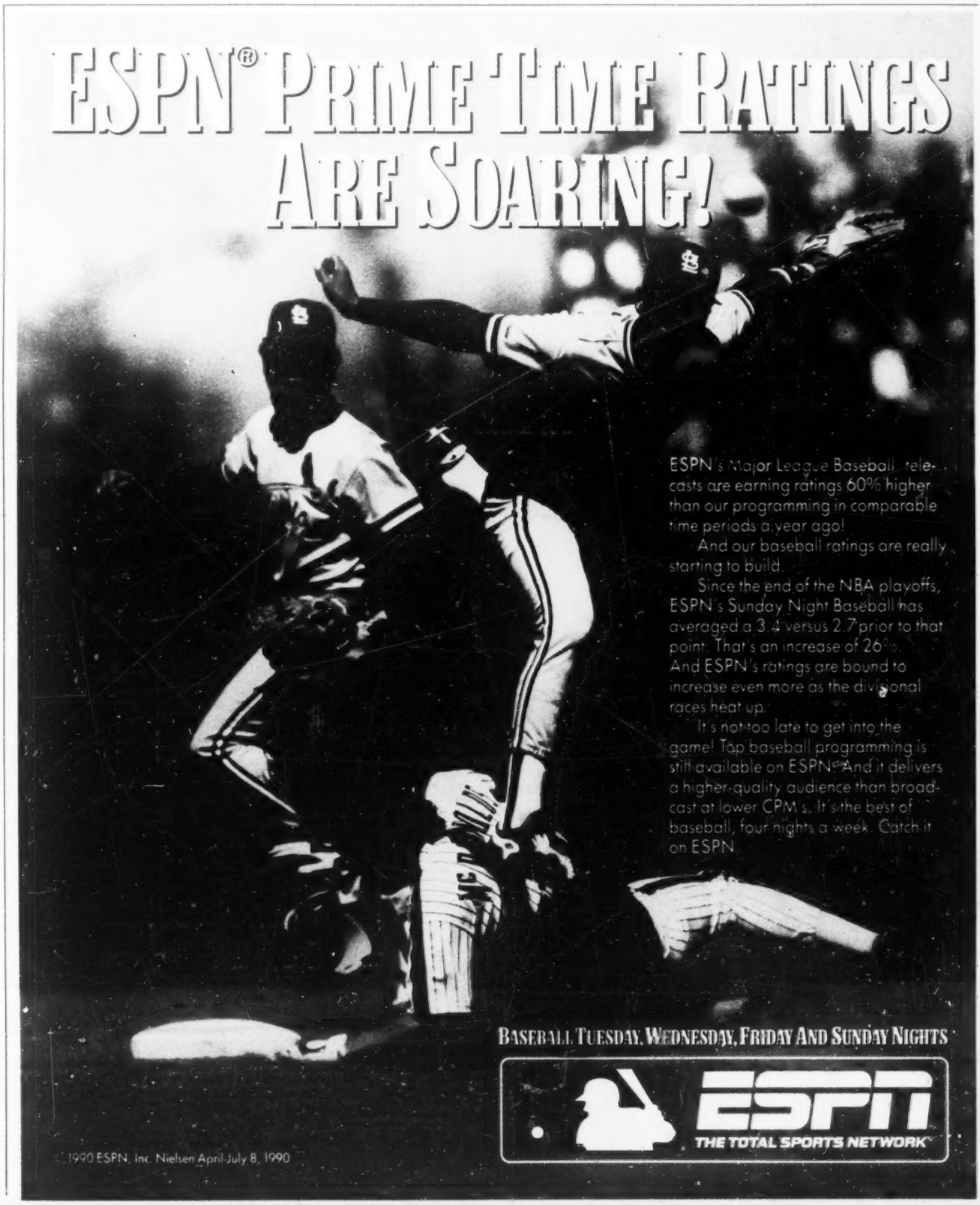
Ad spending in magazines will grow at a 6.8% compound rate, slightly faster than average growth since 1984. Consumer magazine ad revenues will reach $9.4 billion by 1994, compared with $6.75 billion last year, while trade magazine ad spending will rise to $3.65 billion by 1994, compared with $2.77 billion in 1989, the study said. □

Ad growth forecast

Compound annual growth forecast of advertising expenditures from 1989 to 1994.

Spain	25.2%
Italy	10.8%
France	10.2%
West Germany	9.2%
U.K.	7.6%
U.S.	7.2%
Canada	6.1%
Japan	6.0%

Source: Veronis, Suhler & Associates; Wilkofsky Gruen Associates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ESPN's Major League Baseball telecasts are earning ratings 60% higher than our programming in comparable time periods a year ago!
And our baseball ratings are really starting to build.
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It's not too late to get into the game! Top baseball programming is still available on ESPN. And it delivers a higher-quality audience than broadcast at lower CPM's. It's the best of baseball, four nights a week. Catch it on ESPN.
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MEDIAWORKS

JUNE AD RESULTS

Magazine declines mount

By Wayne Walley

Magazine publishers would cheer the first-half results of 1990 if it were any other year.

Ad pages for the first six months of 1990 totaled 85,451.4, Publishers Information Bureau reported. That's up 9.8% from the same period in 1989, but down 3.3% from the record-setting 1989 figures.

June ad pages for titles tracked by PIB were down 3.9% from a year earlier to 14,050.4.

Despite the drop in ad pages, ad revenues for the first six months rose 1.6% to $3.3 billion, while June ad revenues increased 3% to $547.5 million.

Spending in the top 10 ad categories, which accounted for more than 60% of magazine ad spending last month, was flat at $370.7 million. First-half spending levels in those categories fell 1.4% to $2.3 billion, PIB reported.

Automotive, the largest category, dropped 12.6% in the first half to $415 million. Cigarette and tobacco advertising showed the steepest first-half decline, 27.2% to $154.6 million.

Computers, office equipment and stationery fell 7.5% to $110.9 million, while business and consumer services spending was off 0.4% to $252.7 million.

Other top 10 ad categories, however, increased spending. Those showing gains, according to PIB, were retail (up 22.7% to $108.7 million); food and food products (up 11.4% to $233.6 million); apparel, footwear and accessories (up 11.2% to $193.4 million); toiletries and cosmetics (up 6.6% to $340.4 million); travel, hotels and resorts (up 3.8% to $217.1 million); and direct response (up 1.4% to $261 million).

The number of ad pages paints a bleak picture for the industry. Of the top 100 magazines, 70 posted declines in ad volume for the first half of the year while 30 showed an increase.

Last year's ad page leader, *Business Week*, rebounded in June, posting a 10.4% increase in ad pages to 490.45. The McGraw-Hill magazine carried 2,041.82 ad pages in the first six months, down 8.4%, and was the only magazine to top 2,000 during the first half.

Forbes, one of the few publications enjoying an up year, increased ad pages in June by 9.8% to 299.68 and ranked second for the first half with 1,802.41 pages, a 7.9% increase.

Major weeklies continued to be the hardest hit by the slump. Ad pages in Time Warner's *People* fell 7.9% to 268.68 for June and 9.7% to 1,696.95 for the first half. *Time* dropped 3.5% to 194.57 pages in June to finish the first half off 7.5% at 1,248.78 ad pages.

TV Guide rebounded in June with 152.64 ad pages, up 6.3%, but ended the first half down 10.4% with 1,440.17 ad pages. *Newsweek* was up 13.7% in June to 168.29 ad pages, but was still off 8.9% for the first half with 1,071.07. *U.S. News & World Report* had 146.82 ad pages in June, up 10.2%, and finished the first half down 3.6% at 891.23. □

Print advertising opportunities.

The Boston Globe, Chicago Tribune, Los Angeles Times, The New York Times and **The Washington Post**, New York, "Good health magazine" special editorial section, Oct. 7; ad close: July 30. Combined b&w page: $91,625; color page: $121,106.

New York Magazine, New York, "Fall women's and men's fashion" special advertising section, Aug. 20 issue; ad close: July 30. B&w page: $16,570; color page: $26,080.

Newsweek, New York, "The power to heal" special editorial section, September issue; ad close: July 30. B&w page: $66,300; color page: $106,030.

Rolling Stone, New York, "The four decades of rock: the '70s" special editorial section, Sept. 20 issue; ad close: July 30 (color); Aug. 1 (b&w). B&w page: $32,305; color page: $43,040.

Hispanic, Washington, "Hispanic heritage month" special editorial section, September issue; ad close: July 31. B&w page: $5,800; color page: $7,500.

Prevention, Emmaus, Pa., "Breakfast spectacular" special editorial section, October issue; ad close: Aug. 1. B&w page: $29,585; color page: $38,760.

San Francisco Focus, San Francisco, "Fall's performing arts season" special editorial section, September issue; ad close: Aug. 1. B&w page: $5,605; color page: $7,595.

Self, New York, "Peak performance" special editorial section, November issue; ad close: Aug. 1. Color page: $44,413.

Southern Living, Birmingham, Ala., "The Southern home" special editorial section, October issue, ad close: Aug. 1. B&w page: $39,760; color page: $55,940. □

Wayne Walley coordinates MediaWorks.

Magazine ad page leaders

Publishers Information Bureau figures through June 1990.

Rank	Magazine	Pages	% chg	Dollars	% chg
1	Business Week	2,041.82	(8.4)	114,418,955	(7.0)
2	Forbes	1,802.41	7.9	78,057,803	13.7
3	Bride's	1,770.94	2.6	31,490,263	10.2
4	People	1,696.95	(9.7)	160,121,754	(0.5)
5	Fortune	1,547.03	(5.7)	73,843,722	(1.3)
6	TV Guide	1,440.17	(10.4)	155,372,520	(2.3)
7	Vogue	1,354.57	(10.3)	50,281,595	11.9
8	Modern Bride	1,351.63	2.1	22,307,911	7.0
9	The Economist	1,344.63	18.4	11,647,513	34.3
10	Time	1,248.78	(7.5)	171,438,621	(5.6)
11	Sports Illustrated	1,242.77	(16.5)	156,024,443	(5.7)
12	New York Magazine	1,218.65	(13.7)	19,577,930	(7.8)
13	Cosmopolitan	1,096.51	(7.8)	65,377,132	1.6
14	Newsweek	1,071.07	(8.9)	118,981,865	(0.1)
15	The New Yorker	1,042.99	4.5	26,703,553	15.3
16	Elle	1,023.91	(1.4)	30,190,833	5.1
17	Entrepreneur	1,005.70	11.3	9,620,739	41.6
18	Rolling Stone	923.61	(3.7)	33,308,295	1.2
19	Glamour	917.02	(9.4)	46,212,962	(2.8)
20	U.S. News & World Report	891.23	(3.6)	71,505,384	4.4
21	GQ	881.53	(12.3)	21,786,589	(3.8)
22	American Way	878.88	(2.9)	11,763,395	18.5
23	Architectural Digest	877.06	(3.4)	23,342,410	3.4
24	Yachting	864.41	0.4	5,324,799	3.0
25	Family Circle	841.68	(15.2)	68,951,950	(5.1)
26	Good Housekeeping	830.61	8.7	77,947,422	16.1
27	Sunset	775.26	(8.1)	24,082,020	(0.8)
28	Ladies' Home Journal	762.98	(2.2)	54,062,640	8.4
29	Town & Country	751.25	0.3	18,116,001	15.2
30	Mademoiselle	750.10	(8.4)	24,533,619	1.8
31	Woman's Day	749.46	(14.8)	53,782,483	(14.1)
32	Golf Digest	745.09	(0.8)	37,673,436	2.3
33	Skin Diver	726.88	3.1	6,856,989	9.2
34	Parents	720.51	(1.3)	29,360,858	2.3
35	Travel & Leisure	719.62	(6.6)	29,516,858	12.6
36	Golf Magazine	692.74	(10.5)	22,091,794	6.1
37	Southern Living	681.96	(4.3)	33,928,364	2.5
38	Texas Monthly	673.77	9.7	7,659,650	11.6
39	Salt Water Sportsman	658.76	(22.1)	4,295,145	(19.1)
40	Harper's Bazaar	647.46	2.2	17,389,859	10.8
41	Vanity Fair	644.77	2.7	22,716,100	25.7
42	Self	644.06	(2.8)	24,587,717	19.5
43	Better Homes & Gardens	642.80	(12.6)	71,348,590	(8.8)
44	W	639.47	(8.2)	14,729,212	6.3
45	Muscle & Fitness	633.78	(21.3)	10,848,468	(6.9)
46	Gourmet	632.20	6.4	17,005,754	17.7
47	Money	630.34	(0.8)	36,682,662	0.3
48	Seventeen	623.73	(6.5)	18,849,505	(5.6)
49	Bicycling	622.72	(7.3)	8,712,280	9.4
50	Car & Driver	619.28	(8.7)	23,571,914	(13.7)
51	Esquire	600.52	(0.3)	18,704,487	7.4
52	Popular Photography	598.36	23.4	14,358,968	37.7
53	Metropolitan Home	584.27	(5.2)	18,476,074	3.6
54	San Francisco Focus	573.08	(6.5)	3,825,154	4.4
55	Redbook	572.37	2.3	35,388,996	1.8
56	Reader's Digest	561.04	2.1	58,533,630	5.8
57	Ebony	557.63	(9.4)	19,588,943	1.6
58	Country Living	552.69	(3.9)	22,255,333	(0.8)
59	Road & Track	539.73	(15.1)	15,944,571	(21.9)
60	Conde Nast Traveler	537.05	16.4	15,067,278	39.6
61	Financial World	536.68	33.9	12,521,875	63.0
62	House & Garden	531.78	19.5	13,144,743	24.5
63	Inc.	520.27	(9.9)	21,131,451	(3.4)
64	Bon Appetit	515.15	5.0	15,471,032	8.9
65	Black Enterprise	513.76	(5.7)	6,839,733	2.9
66	Mirabella	511.18	320.4	7,977,554	501.1
67	Jet	509.71	(10.9)	8,582,001	(1.2)
68	McCall's	488.11	(13.1)	35,282,423	(4.7)
69	Smithsonian	486.77	(6.4)	20,707,756	(3.7)
70	Four Wheeler	477.19	(2.7)	3,757,306	7.0
71	Art & Antiques	476.23	10.3	2,740,064	20.3
72	Working Woman	472.70	(12.1)	14,531,779	(4.9)
73	New Woman	453.86	(15.0)	11,103,250	(10.2)
74	Essence	451.82	(1.1)	11,328,369	13.4
75	Bass Master	439.97	(17.1)	8,720,856	(4.7)
76	Delta Sky	438.40	(4.4)	10,764,140	(1.2)
77	Motor Trend	435.23	(20.4)	15,919,940	(10.5)
78	Field & Stream	430.57	(16.4)	17,192,128	(19.7)
79	Hot Rod	416.78	(27.2)	9,846,173	(22.6)
80	Outdoor Life	403.70	(23.3)	11,943,709	(17.1)
81	Popular Mechanics	403.47	(22.6)	12,947,096	(20.5)
82	Popular Science	398.87	(30.9)	10,927,536	(30.6)
83	California	396.10	11.4	5,525,162	19.7
84	Southern Accents	384.89	16.4	3,840,970	26.0
85	Sport's Afield	383.92	(8.8)	7,391,328	1.9
86	Entertainment Weekly	383.87	—	7,954,931	—
87	Premiere	383.17	5.9	6,761,175	27.9
88	Parenting	379.07	21.6	6,682,757	66.4
89	Yankee	377.49	0.9	4,493,145	8.5
90	House Beautiful	372.46	(8.6)	13,426,961	(0.3)
91	Tennis	367.32	(7.5)	11,785,324	38.2
92	Connoisseur	365.69	(22.3)	6,467,623	(12.0)
93	US	365.08	(2.7)	10,590,080	(5.2)
94	Working Mother	362.37	(15.1)	8,279,924	(0.6)
95	1,001 Home Ideas	356.63	2.7	10,166,390	17.1
96	National Journal	354.83	(6.8)	2,406,215	0.4
97	M	354.58	(8.3)	4,484,139	4.7
98	Life	352.19	(13.9)	24,532,829	(14.8)
99	Playboy	349.73	(7.0)	23,489,145	1.3
100	Food & Wine	349.45	(5.2)	8,221,042	(2.7)

Percent change compares January-June in 1990 with 1989. Source: Publishers Information Bureau

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CONSUMER MAGAZINE AD LINAGE

	June		Year-to-date	
	1990	1989	1990	1989
uto/cycle/rec. vehicles				
Week (52X)	154.6	185.0	893.1	947.7
& Driver C.	132.9	160.0	619.3	678.5
ollector & Car Classics	14.1	17.6	95.3	101.8
Craft	87.6	110.6	421.1	468.9
e Track	77.3	90.6	522.3	537.4
e	60.0	50.2	267.4	294.7
e World	68.4	41.5	301.7	268.5
Rider	55.6	41.2	251.8	204.3
Buggies & Hot VWs	75.5	71.3	415.2	409.7
y Motor Coaching	185.3	198.8	1,004.1	1,126.9
heel & Off-Road	110.9	86.9	482.3	485.5
Wheeler C.	97.9	93.3	477.2	490.4
Rod C.	80.6	99.8	416.8	572.3
orcyclist	65.7	54.3	273.6	282.6
or Trend C.	95.1	103.8	435.2	546.6
omome	98.3	104.7	576.6	578.0
r	48.4	42.0	221.6	228.8
d & Track C.	104.5	145.3	539.7	635.4
blazer	46.0	61.0	271.0	350.0
er Life	95.5	90.5	546.8	581.3
otal Group	**1,754.1**	**1,848.5**	**9,031.9**	**9,782.9**
% change	**-5.1%**		**-7.7%**	
Boating & yachting				
ting	110.3	131.7	847.6	995.5
sapeake Bay	48.3	64.3	269.5	323.5
sing World	89.3	96.3	672.7	700.1
dland Boating (11X)	83.5	86.5	520.5	592.1
or Boating & Sailing	125.5	131.4	816.6	986.8
	81.1	98.4	695.0	713.2
er Boats (11X)	58.3	55.8	442.0	497.2
stern Boatman	—	—	158.4	152.1
hting C.	13.6	139.9	854.4	851.4
otal Group	**739.5**	**804.4**	**5,276.7**	**5,811.9**
% change	**-8.0%**		**-9.2%**	
Civic/fraternal				
(10X)	13.0	14.3	93.3	90.0
ans	14.9	18.3	101.5	96.7
(10X)	4.3	9.5	24.3	28.9
ogue	16.7	10.0	97.8	74.6
W (11X)	30.5	20.0	164.8	163.1
Total Group	**79.4**	**72.1**	**481.6**	**457.3**
% change	**10.2%**		**5.3%**	
General				
ncan Health (10X) C.	26.3	72.6	269.8	392.5
ncan Heritage (6X) C.	—	—	162.5	174.8
ncan Legion	25.6	20.6	212.8	199.0
ncan West (6X)	—	—	69.5	104.6
& Antiques (10X) C.	94.9	83.0	426.2	431.7
News (10X)	116.5	109.8	721.5	682.8
Atlantic A. C.	56.7	42.8	325.4	314.7
Appetit A. C.	61.3	68.5	515.2	495.6
e Guide C.	20.0	33.7	165.9	212.9
nging Times C.	58.9	40.7	336.2	318.5
de Nast Traveler C.	79.1	71.5	537.1	461.4
noisseur C.	55.3	71.0	365.7	470.8
sumers Digest (9X) C.	—	—	82.2	77.4
ving Light C.	—	—	184.4	153.6
ny C.	80.9	106.1	557.6	615.8
opean Travel &				
Life (10X) C.	53.4	42.0	274.2	242.0
d & Wine C.	54.1	72.1	349.5	372.6
mes (6X) C.	—	—	34.1	50.6
den Years (6X)	—	—	108.2	161.3
urmet C.	104.7	98.5	632.2	594.0
per's Magazine A. C.	31.8	27.7	183.3	186.4
rrowsmith (6X)	—	—	154.1	174.2
nds (6X)	—	—	186.5	196.9
's Live	48.0	43.0	298.0	275.0
e C.	55.9	53.0	352.2	409.3
ngevity C.	40.0	23.5	201.2	103.2
dern Maturity (6X) C.	32.8	30.8	109.7	114.1
ney C.	117.5	121.8	630.3	635.3
ther Earth News (5X) C.	—	—	202.5	242.0
tional Geographic C.	16.8	19.3	137.9	127.0
tional Geographic				
Traveler (6X) C.	—	—	157.6	103.4
tural History C.	28.4	36.5	261.9	263.4
w Choices C.	24.4	34.5	177.7	221.6
vention C.	52.3	43.9	307.8	327.3
ader's Digest A. C.	90.9	91.7	561.0	549.7
turday Evening				
Post (9X) C.	—	—	147.0	178.6
thsonian C.	74.3	89.4	486.8	520.1
wn & Country C.	122.9	104.4	751.3	749.4
vel-Holiday C.	31.3	26.2	242.4	239.0
vel & Leisure C.	99.2	96.3	719.6	770.3
velhost	1,345.0	1,319.0	7,603.0	7,556.0
nity Fair C.	105.0	86.5	644.8	628.0
ree C.	61.9	50.8	377.5	374.1
Total Group	**3,265.0**	**3,254.3**	**21,273.7**	**21,465.4**
% change	**0.3%**		**-0.9%**	
Home				
nericana (6X)	—	—	34.8	63.6
hitectural Digest A. C.	138.4	144.1	877.1	907.9
ter Homes & Gardens C.	115.0	135.5	642.8	735.1
onial Homes (6X) C.	63.1	58.3	161.4	182.7
lumbus Monthly-				
Homes (4X)	—	—	57.2	60.9
untry Home (6X) C.	73.3	68.0	187.7	225.1
untry Living C.	98.6	85.2	552.7	575.3
mily Handyman				
(10X) A. C.	23.9	52.4	208.1	295.1
rida Home & Garden	94.2	116.3	424.8	556.7
wer & Garden (6X) C.	—	—	134.1	144.7
me C.	45.1	56.4	341.8	357.5
me Mechanix C.	64.0	37.3	299.5	305.6
meowner (10X) C.	17.7	39.6	143.1	186.7
me	40.9	37.4	288.0	260.4
House Beautiful C.	59.8	75.5	372.5	407.4
House & Garden C.	79.1	62.0	531.8	444.9
Metropolis	46.2	52.4	309.6	359.8
Metropolitan Home C.	70.2	76.5	584.3	616.1
Midwest Living C.	86.3	71.1	214.8	207.7
1,001 Home Ideas C.	42.7	61.1	356.6	347.2
Organic Gardening (9X) C.	—	36.5	230.3	267.6
Phoenix Home/Garden	46.7	57.8	404.7	429.5
Practical Home-owner (9X) C.	45.8	33.2	203.6	131.3
San Diego Home/Garden	66.0	70.0	448.7	455.7
Southern Accents (6X) C.	58.3	—	384.9	330.6
Southern Living C.	132.3	117.8	681.9	712.7
Sunset Magazine A. C.	124.0	152.5	775.3	843.1
Workbench (6X)	—	—	111.4	136.7
Total Group	**1,630.6**	**1,696.8**	**9,963.3**	**10,547.2**
% change	**-3.9%**		**-5.5%**	
In-flight & other passenger				
Aboard Group (6X)	—	—	122.7	108.3
Air Group One:				
Delta Sky C.	80.9	73.1	438.4	458.6
TWA Ambassador B.	39.0	—	236.5	—
Alaska Airlines	77.8	70.5	446.9	369.1
America West Airlines	84.5	67.7	466.2	393.0
American Way (24X) C.	158.0	155.6	878.9	905.5
East/West Network:				
Continental Profiles	51.4	62.1	315.1	373.6
Eastern Review	30.0	59.3	191.4	325.2
Pan Am Clipper	50.1	56.3	287.8	290.0
Southwest Spirit	53.6	68.2	314.2	402.6
Vis `A Vis	72.9	88.6	417.7	520.0
Pace Communications:				
US Air Magazine	64.1	51.4	367.3	331.6
Spirit of Aloha	34.1	24.4	202.4	143.2
Total Group	**757.4**	**777.2**	**4,449.0**	**4,620.7**
% change	**-2.5%**		**-3.7%**	
Men's				
Esquire A. C.	112.4	105.4	600.5	602.1
Firehouse Magazine	48.6	43.7	212.1	219.7
Gentlemen's Quarterly A. C.	116.3	169.5	881.5	1,005.2
M Magazine C.	46.2	49.7	354.6	386.8
Men's Health (6X)	—	—	52.2	—
Muscle & Fitness C.	111.5	127.2	633.8	805.1
Penthouse A. C.	57.1	51.9	312.9	296.5
Playboy A. C.	64.4	60.2	349.7	376.0
Salute (10X)	57.4	77.1	237.3	185.9
Total Group	**613.9**	**684.6**	**3,634.6**	**3,877.1**
% change	**-10.3%**		**-6.3%**	
Metropolitan				
Aloha (6X)	—	—	134.6	87.0
Atlanta	74.6	54.6	420.4	370.5
Baltimore	44.8	60.0	355.5	402.4
Boston	93.9	128.1	606.1	790.5
Gateway C.	64.9	60.5	398.1	357.4
Chicago	89.7	105.4	344.7	667.7
Chicago's North Shore	81.4	101.5	538.6	601.9
Cincinnati	31.9	45.7	221.1	277.9
Cleveland	50.8	42.2	269.9	324.0
Columbus Monthly	45.9	58.0	349.8	392.6
Connecticut	81.1	108.0	530.0	621.4
D Magazine	60.9	74.8	335.5	423.7
Detroit Monthly	60.9	57.1	343.0	346.6
Grand Rapids	41.3	53.5	183.1	223.5
Honolulu	50.5	46.9	307.2	296.8
Houston Metropolitan Magazine	45.1	51.9	365.0	328.0
Inside Chicago (8X)	—	—	87.6	122.8
Los Angeles	146.6	127.7	823.1	884.2
Louisiana Life (6X)	—	—	90.0	67.4
Madison	50.0	44.0	245.0	252.0
Memphis	53.1	54.0	311.2	380.0
Mid Atlantic Country	52.7	47.3	276.3	238.8
Milwaukee	43.7	40.3	338.3	307.8
Minneapolis/St. Paul	99.0	100.3	622.8	643.4
Minnesota Monthly Mag.	59.4	58.5	399.2	278.1
Nashville	13.1	24.4	78.7	152.1
New England Monthly	58.1	48.0	249.5	303.5
New Jersey Monthly	74.5	104.4	417.2	547.1
New Mexico	38.3	36.2	249.8	258.4
Ohio	63.8	66.8	330.5	319.9
Orlando	82.6	95.0	567.3	568.7
Pacific Northwest	43.8	39.5	291.1	286.6
Palm Beach Life	31.6	35.6	424.3	470.4
Palm Springs Life	58.7	63.0	749.5	778.5
Philadelphia	107.6	113.7	732.5	788.3
Phoenix	28.1	34.2	218.0	294.3
Pittsburgh	100.3	117.0	416.4	419.5
Rhode Island Monthly	49.2	78.6	334.5	335.0
Sacramento Magazine	59.2	48.7	342.1	305.8
St. Louis	87.9	42.6	355.8	286.7
San Diego	131.8	142.8	770.4	789.1
San Francisco Focus C.	94.2	94.2	573.1	613.2
Sarasota	48.0	56.0	524.0	534.0
South Florida Magazine	96.7	111.2	556.8	675.1
Texas Monthly C.	105.4	85.7	673.8	614.4
Washington (10X)	33.2	—	175.0	233.0
Washington-Dossier	44.2	34.2	242.1	211.3
The Washingtonian	118.1	138.5	786.7	982.7
Total Group	**3,012.9**	**3,131.2**	**19,154.3**	**20,461.2**
% change	**-3.8%**		**-6.4%**	
Music/entertainment				
Audio	91.2	106.4	513.9	562.0
Dance Magazine	41.6	42.8	359.3	347.6
Playbill	40.2	40.9	277.2	295.0
Video Magazine	70.0	58.2	389.5	352.3
Total Group	**243.0**	**248.2**	**1,539.9**	**1,556.9**
% change	**-2.1%**		**-1.1%**	
Outdoor & sport				
Alpine	37.9	31.3	251.1	248.6
The American Handgunner (6X)	—	—	172.0	155.0
American Hunter	17.4	18.1	101.2	101.6
American Rifleman	24.5	18.6	132.8	125.2
Backpacker (7X) C.	33.2	30.9	138.6	123.9
Bass Master (10X) A. C.	47.3	55.7	440.0	530.8
Bicycling (9X) C.	126.4	140.0	622.7	671.7
Cross Country Skier (5X)	—	—	73.6	70.5
Ducks Unlimited (6X)	—	—	77.2	73.7
Field & Stream C.	66.8	64.5	430.6	515.2
Fishing World (6X)	—	—	161.8	152.5
Florida Sportsman	109.6	107.8	827.2	846.2
Golf Digest C.	144.7	139.7	745.1	750.7
Golf Illustrated C.	68.9	62.9	299.8	283.3
Golf Magazine C.	108.4	96.0	692.7	774.1
Gun Dog (6X)	—	—	119.3	125.5
Guns	40.0	33.0	239.0	212.0
Guns & Ammo	45.4	33.1	273.6	251.3
In-Fisherman (7X)	34.0	40.0	403.5	483.5
Outdoor Life C.	63.2	62.3	403.7	526.1
Outside Magazine	76.3	67.3	399.9	393.4
Petersen's Hunting	38.0	42.7	215.0	239.2
Runner's World (12X) C.	46.5	47.3	210.3	237.7
Salt Water Sportsman C.	81.9	125.8	658.8	845.8
Shooting Times	27.6	28.5	180.1	183.0
Sierra (6X)	—	—	112.5	144.3
Ski (8X) A. C.	—	—	292.8	336.4
Skiing (7X) A. C.	—	—	230.0	216.4
Skin Diver C.	152.5	132.6	726.9	705.3
Southern Outdoors (9X)	—	—	230.1	296.4
Southern Saltwater (8X)	—	—	226.4	288.2
Sport Magazine C.	41.7	56.8	183.2	234.0
Sports Afield C.	44.0	59.7	383.9	421.1
Surfing	61.0	77.2	409.2	451.1
Tennis C.	76.1	59.7	367.3	396.9
Waterski (9X)	71.3	77.8	391.0	431.3
Western Outdoors (9X)	29.6	21.2	196.2	243.3
Wildfowl (6X)	—	—	57.3	47.5
WindRider (8X)	72.6	55.6	316.7	218.0
Wing & Shot (6X)	—	—	46.1	44.0
World Tennis C.	35.9	52.6	215.4	296.1
Total Group	**1,822.6**	**1,838.8**	**12,654.3**	**13,690.6**
% change	**-0.9%**		**-7.6%**	
Photography				
American Photo (6X) C.	—	29.5	143.8	193.8
Petersen's Photographic	28.6	26.4	145.1	170.1
Popular Photography C.	102.7	84.8	598.4	485.0
Total Group	**131.3**	**140.7**	**887.3**	**848.9**
% change	**-6.7%**		**4.5%**	
Science/electronic/mech				
Discover C.	35.1	41.2	215.0	241.9
Home Office Computing C.	42.0	49.8	285.6	286.7
Omni C.	45.5	58.5	309.1	360.1
Personal Computing	165.0	164.0	817.0	1,029.0
Popular Mechanics C.	61.8	80.5	403.5	521.5
Popular Science C.	78.2	126.2	398.9	577.2
Scientific American C.	45.5	38.2	235.1	247.5
Spectrum C.	55.5	55.5	317.5	353.6
Total Group	**528.5**	**613.9**	**2,981.6**	**3,617.5**
% change	**-13.9%**		**-17.6%**	
Woman/fashion/service				
Bride's Magazine (6X) A. C.	476.0	499.0	1,770.9	1,726.1
Cosmopolitan A. C.	155.6	187.9	1,096.5	1,189.7
Elle C.	131.9	116.2	1,023.9	1,038.1
Essence C.	55.7	68.4	451.8	456.8
Family Circle (17X) A. C.	181.2	183.7	841.7	992.4
Glamour C.	166.2	177.0	917.0	1,011.7
Good Housekeeping A. C.	151.9	152.9	830.6	778.2
Harper's Bazaar C.	65.4	60.5	647.5	633.4
Health C.	33.6	40.2	212.6	198.3
Imagen	84.6	117.7	591.9	538.0
Ladies' Home Journal C.	113.7	127.0	762.7	780.1
Lear's C.	42.5	42.3	323.8	318.6
Mademoiselle C.	118.4	127.0	750.1	819.2
McCall's C.	84.1	93.3	488.1	561.4
Military Lifestyle (10X)	104.6	46.4	480.2	495.7
Mirabella	78.2	121.6	511.2	121.6
Modern Bride (6X) C.	326.4	351.9	1,351.6	1,324.0
New Woman C.	68.3	78.8	453.9	534.2
Parents Magazine A. C.	132.9	139.4	720.5	730.3
Redbook C.	108.1	95.7	572.4	559.6
Savvy C.	26.2	44.1	199.6	289.2
Self C.	79.0	91.7	644.1	662.4
Seventeen C.	76.5	107.4	623.7	667.3
Shape C.	59.8	64.6	328.5	396.4
Soap Opera Digest (26X) C.	25.6	39.5	207.1	234.5
Soap Opera Update	12.5	14.0	64.0	61.8
Teen Magazine	28.2	43.3	276.3	263.5
True Story A. C.	52.5	47.3	323.7	312.0
Vogue C.	152.7	149.7	1,354.7	1,510.1
W Magazine (26X) C.	43.2	47.1	639.5	682.0
Weight Watchers C.	31.7	26.7	213.7	200.0
Woman (10X) C.	23.3	25.0	147.6	175.7
Woman's Day (15X) A. C.	112.7	101.5	749.5	879.4
Workbasket	20.0	22.2	124.9	145.2
Working Mother C.	56.8	57.6	362.4	427.0
Working Woman C.	61.8	90.0	472.7	537.7
Total Group	**3,545.9**	**3,798.3**	**21,530.9**	**22,051.4**
% change	**-6.6%**		**-2.4%**	
Youth				
Boys' Life C.	12.6	20.4	103.7	111.3
Campus Life (10X)	—	—	204.5	214.0
Total Group	**12.6**	**20.4**	**308.2**	**325.9**
% change	**-38.0%**		**-5.4%**	
Business/national				
Barron's	157.9	180.3	881.3	904.5
Black Enterprise C.	183.4	206.2	513.8	545.0
Business Month C.	37.9	35.4	215.7	199.4
Business Week (52X) A. C.	490.5	444.2	2,041.8	2,229.7
Entrepreneur C.	160.1	137.0	1,005.7	903.8
Financial World (26X) C.	70.9	71.3	536.7	400.7
Forbes (26X) C.	299.7	273.0	1,802.4	1,670.5
Fortune (26X) C.	301.4	421.5	1,547.0	1,639.8
Frequent Flyer	41.5	32.6	240.5	251.0
Futures	43.3	43.4	250.2	265.2
Inc. Magazine C.	78.6	97.7	520.3	577.6
Income Opportunities	69.5	71.9	384.5	416.2
Industry Week (23X) A.	94.3	112.7	531.8	546.5
Nation's Business (12X) A. C.	29.5	38.8	158.3	228.1
Total Group	**2,058.4**	**2,165.9**	**10,630.8**	**10,778.1**
% change	**-5.0%**		**-1.4%**	
Business/regional				
Advantage-Nashville's Bus. Monthly	22.3	32.3	134.6	200.8
Arizona Business Gazette	66.0	76.7	271.0	367.2
Bus. Jrnl.-Milwaukee	130.2	147.6	887.5	887.2
Bus. Jrnl.-Sacramento	73.2	79.4	507.6	474.5
Bus. North Carolina	56.8	54.5	250.3	252.0
Capital Dist. Bus. Review (52X)	80.1	93.0	416.6	441.8
Caribbean Business	157.9	167.3	723.7	751.4
Corporate Report Minnesota	47.5	49.3	272.6	337.3
Crain's Chicago Bus. (52X)	141.9	134.0	840.5	826.7
Crain's Cleveland Bus. (52X)	67.5	70.4	450.6	458.8
Crain's Detroit Bus. (52X)	85.0	77.5	530.6	454.5
Crain's New York Bus. (52X)	81.5	51.6	418.5	330.0
Florida Trend (13X)	36.0	50.6	289.1	366.8
Georgia Trend	57.3	30.5	266.9	273.6
Grand Rapids Bus. Jrnl.	57.1	44.1	330.1	264.8
Hawaii Business	42.3	35.5	294.7	261.9
Houston Bus. Jrnl. (52X)	78.5	64.5	375.5	431.3
Indianapolis Business Journal (52X)	162.2	148.4	856.7	896.7
Manhattan Inc. C.	47.9	53.0	253.2	283.2
New England Bus. (12X) A.	30.3	32.8	197.2	253.4
New Orleans City Bus.	49.9	38.6	292.0	242.0
Pacific Bus. News (52X)	110.2	104.2	611.4	607.9
Philadelphia Business Journal	96.2	173.7	224.6	376.2
Pittsburgh Business Times (52X)	89.0	122.3	564.8	701.3
Providence Business News	81.1	85.9	426.4	533.3
Regardie's/Washington	123.0	172.0	810.0	937.0
St. Louis Bus. Jrnl. (52X)	97.0	94.9	638.8	629.5
Warfield's Monthly Baltimore	51.9	49.7	361.8	381.7
Total Group	**2,219.9**	**2,334.2**	**12,497.3**	**13,222.9**
% change	**-4.9%**		**-5.5%**	
National Sunday mags				
Parade (52X) C.	53.3	52.8	340.0	356.7
USA Weekend (52X) C.	48.7	46.9	321.4	303.7
Vista Magazine (52X)	16.7	17.6	108.7	120.2
Total Group	**118.8**	**117.3**	**770.1**	**780.6**
% change	**1.2%**		**-1.3%**	
Newspaper Sunday magazine				
Boston Globe	127.0	167.2	1,006.8	1,204.7
Chicago Tribune	134.7	109.2	734.3	658.8
Cleveland Plain Dealer	47.7	67.7	349.6	399.1
The Dallas Morning News	47.3	64.9	306.2	392.8
Detroit Free Press	54.0	42.0	309.0	272.0
L.A. Times C.	62.0	94.2	491.5	632.9
Louisville Courier-Jrnl.	25.0	24.0	146.0	179.0
New York Times Mag. C.	268.7	286.9	1,871.6	1,910.9
Philadelphia Inquirer	103.3	83.5	561.6	538.6
Seattle Times	69.0	56.0	461.0	391.0
St. Louis Post Dispatch	79.3	66.5	456.9	482.4
Washington Post	97.3	121.2	649.9	814.6
Total Group	**1,115.2**	**1,183.3**	**7,344.4**	**7,876.8**
% change	**-5.8%**		**-6.8%**	
Weeklies/bi-weeklies				
The Advocate (26X)	150.3	136.0	792.9	890.2
Army Times Military Group:				
Air Force Times (52X)	133.5	150.2	894.4	945.7
Army Times (52X)	138.2	147.5	889.2	905.9
Navy Times (52X)	143.7	169.8	937.7	1,035.0
Capper's (26X)	23.4	24.2	179.8	198.9
Commonweal (22X)	4.8	2.7	60.0	48.5
Golf World (10X)	175.4	133.9	896.9	751.8
Grit (52X) A.	29.4	28.5	226.5	208.5
National Journal (50X) C.	72.0	68.7	354.8	380.7
National Review (25X)	31.3	33.5	161.4	158.6
New Republic (48X)	33.0	35.8	237.7	259.1
New York Mag. (50X) C.	187.7	193.3	1,218.7	1,412.4
New Yorker C.	132.2	139.2	1,043.0	998.2
Newsweek (52X) A. C.	168.3	148.0	1,071.1	1,175.9
People (51X) C.	268.7	251.7	1,697.0	1,879.7
Rolling Stone (25X) C.	157.5	194.5	923.6	959.0
Sporting News (52X) C.	39.6	48.5	253.5	293.9
Sports Illustrated (52X) A. C.	185.1	211.6	1,242.6	1,482.8
Time (52X) A. C.	194.6	201.6	1,248.8	1,349.7
TV Guide (52X) A. C.	152.6	143.6	1,440.2	1,666.5
US Magazine (26X) C.	55.8	72.0	365.1	375.1
U.S. News & World Report (50X) A. C.	146.9	133.3	891.2	924.9
Total Group	**2,604.0**	**2,708.1**	**17,028.1**	**18,247.1**
% change	**-3.8%**		**-6.7%**	

NOTES: Linage is given in paid ad pages. (X) represents the number of times published each year; publications are monthly unless otherwise specified. A. Sectional linage included but prorated to circulation of regional editions. B. Incomplete report not included in group total and % change. C. Figures supplied by Publishers Information Bureau. All other figures are supplied by the magazines. *Ad Age* makes no attempt to verify figures and is not responsible for inconsistencies or errors. Compiled by Kathy Welyki.

New cereal brands put snap in market

By John C. Maxwell Jr.

The ready-to-eat cereal industry witnessed another strong year in 1989 with volume up about 3.5% to 2.6 billion pounds. On a dollar basis, sales climbed some 15% to $6.8 billion.

For 1990, volume will increase another 3.5%.

Kellogg Co.'s share erosion, down almost 3 points last year, reflects the decline of established brands.

Corn Flakes, Rice Krispies, Raisin Bran and Froot Loops have continued to erode.

On the other side, Common Sense Oat Bran flakes, introduced late in 1988, has been a real winner for Kellogg.

Heartwise, Kenmei Rice Bran and Bigg Mixx have been introduced recently so it's too early to make a judgment on these brands.

There will be some added erosion of Kellogg's share this year, along with a further stream of new-product introductions.

General Mills gained more than 2 share points for the year, and the company will maintain or increase its share this year. General Mills' basic products have continued to perform well.

Its two newest products, Apple Cinnamon Cheerios and Total Raisin Bran, have added to the company's total share.

Kraft General Foods' share erosion continued, down about 1.5 points for the year, and this has continued into 1990.

As with Kellogg, many Kraft General Foods' Post products don't speak to the new health perceptions of people relating to such foods as oats and bran. Honey Bunches of Oats, one of Post's first new products in many years, is doing well.

The company needs a stream of new products to at least maintain share, but there may be more erosion during the year.

Quaker Oats Co. also is under pressure, with its main product, Cap'n Crunch, eroding slightly, along with Life cereals. Some recently introduced products have offset the declines of these older products.

Without some new-product movement, however, there will be further erosion on the Quaker front.

Ralston Purina Co. gained some share in 1989 and this year, mainly due to its licensed products such as Nintendo Cereal System and Teenage Mutant Ninja Turtles.

The company is losing market share on some of its old-line products, such as Chex, Almond Delight and Cookie-Crisp, and is increasingly dependent on licensed products to see growth.

Nabisco Brands continued its share loss in 1989, and the company will lose more share unless it comes up with products that meet the current consumer spectrum.

Teddy Grahams Breakfast Bears has been recently introduced, but it's too early to evaluate this product's performance. □

Mr. Maxwell is an analyst with Wheat, First Securities, Richmond, Va.

Market shares of the top 10 cold cereals

	1988		1989	
Brand	Lbs.	$	Lbs.	$
Corn Flakes (Kellogg)	5.8%	3.5%	5.4%	3.4%
Frosted Flakes (Kellogg)	5.3	4.8	5.1	4.6
Cheerios (General Mills)	4.5	4.6	4.7	4.8
Raisin Bran (Kellogg)	4.1	3.5	3.7	3.1
Rice Krispies (Kellogg)	3.4	3.5	3.1	3.2
Honey Nut Cheerios (General Mills)	3.1	3.4	3.1	3.4
Cap'n Crunch (Quaker Oats)	3.2	3.0	2.9	2.7
Chex (Ralston Purina)	3.2	3.2	2.9	2.9
Shredded Wheat (Nabisco)	3.2	3.0	2.8	2.6
Bran products (Kellogg)	3.0	2.5	2.6	2.3
Total	**36.8%**	**35.0%**	**36.3%**	**33.0%**

Source: John C. Maxwell Jr.

Cold cereal market shares

	1987		1988		1989	
Kellogg	**Lbs.**	**$**	**Lbs.**	**$**	**Lbs.**	**$**
Corn Flakes	6.3%	4.2%	5.8%	3.5%	5.4%	3.4%
Frosted Flakes	5.9	5.5	5.3	4.8	5.1	4.6
Raisin Bran	4.3	3.7	4.1	3.5	3.7	3.1
Rice Krispies	3.6	3.8	3.4	3.5	3.1	3.2
Bran products	3.5	2.8	3.0	2.5	2.6	2.3
Frosted Mini-Wheats	2.2	2.1	2.2	2.2	2.1	2.2
Froot Loops	2.3	2.9	2.1	2.6	1.9	2.3
Common Sense Oat Bran	—	—	0.3	0.3	1.6	1.9
Cracklin' Oat Bran	—	—	1.1	1.3	1.6	1.9
Special K	1.6	2.0	1.5	1.7	1.3	1.7
Nutri-Grain	1.7	1.8	1.5	1.7	1.2	1.3
Apple Jacks	1.1	1.5	1.1	1.4	1.0	1.3
Mueslix	0.2	0.3	1.1	1.5	0.9	1.0
Corn Pops	0.9	1.1	0.9	1.1	0.9	1.1
Shredded Wheat Squares	0.8	0.8	1.1	1.1	0.8	0.9
Crispix	1.0	1.2	0.9	1.1	0.8	1.0
Product 19	0.8	1.0	0.8	1.0	0.7	0.8
Honey Smacks	1.0	1.0	0.8	0.8	0.7	0.8
Nut & Honey Corn Flakes	—	—	—	—	0.7	0.7
Cocoa Krispies	0.6	0.8	0.5	0.6	0.5	0.6
S.W. Graham	—	—	—	—	0.4	0.4
Just Right	0.8	1.0	0.9	1.1	0.3	0.3
Apple Raisin Crisp	0.4	0.4	0.3	0.3	0.2	0.3
Fruity Marshmallow Krispies	0.4	0.4	0.3	0.3	0.2	0.2
Heartwise	—	—	—	—	0.1	0.1
Oatbake	—	—	—	—	0.1	0.2
Others	1.1	1.3	2.0	2.9	1.1	2.0
Total	**42.5**	**42.0**	**42.1**	**42.2**	**39.0**	**39.6**
General Mills						
Cheerios	4.6	4.9	4.5	4.6	4.7	4.8
Honey Nut Cheerios	2.9	3.2	3.1	3.4	3.1	3.4
Total	2.1	2.6	2.3	2.7	2.1	2.6
Lucky Charms	1.5	1.8	1.6	1.9	1.7	2.0
Apple Cinnamon Cheerios	—	—	—	—	1.2	1.5
Wheaties	1.6	1.4	1.5	1.3	1.6	1.3
Raisin Nut Bran	1.0	1.0	1.2	1.2	1.2	1.2
Total Raisin Bran	—	—	—	—	0.8	1.1
Trix	1.1	1.5	1.1	1.5	1.1	1.4
Oatmeal Raisin Crisp	0.4	0.4	0.9	0.9	1.1	1.1
Golden Grahams	1.0	1.1	1.0	1.1	1.0	1.1
Cinnamon Toast Crunch	0.6	0.7	0.7	0.8	0.8	0.9
Kix	0.6	0.8	0.7	0.8	0.8	1.0
Cocoa Puffs	0.6	0.8	0.6	0.8	0.6	0.8
Clusters	0.2	0.2	0.4	0.5	0.6	0.7
Crispy Wheats 'n Raisins	0.6	0.7	0.6	0.6	0.5	0.6
Monster cereals	0.4	0.6	0.5	0.6	0.4	0.5
Fibre One	0.4	0.4	0.3	0.4	0.3	0.4
Others	0.3	0.5	0.6	1.3	0.1	0.1
Total	**20.7**	**23.6**	**21.6**	**24.4**	**23.7**	**26.5**

	1987		1988		1989	
General Foods	**Lbs.**	**$**	**Lbs.**	**$**	**Lbs.**	**$**
Grape-Nuts	2.6%	1.8%	2.4%	1.7%	2.1%	1.5%
Raisin Bran	2.5	2.2	2.3	2.0	1.7	1.5
Pebbles	1.5	1.9	1.5	1.9	1.3	1.5
Super Golden Crisps	1.1	1.1	1.0	1.0	0.8	0.8
Honey Bunches of Oats	—	—	—	—	0.8	0.9
Post Fruit & Fiber	1.4	1.4	1.1	1.3	0.7	0.6
40% Nat'l. Bran Flakes	0.8	0.7	0.8	0.6	0.7	0.5
Honeycombs	0.8	0.9	0.7	0.9	0.7	0.8
Post Toasties	0.7	0.5	0.5	0.2	0.5	0.2
Alpha-Bits	0.5	0.7	0.5	0.5	0.5	0.4
Oat Flakes	—	—	—	—	0.5	0.6
Others	0.1	0.1	0.6	0.8	0.3	0.7
Total	**12.8**	**12.1**	**11.9**	**11.4**	**10.6**	**10.0**
Quaker Oats						
Cap'n Crunch	2.9	3.2	3.2	3.0	2.9	2.7
Life	1.5	1.4	1.6	1.5	1.2	1.1
100% Natural	1.2	1.1	1.3	1.2	1.0	0.9
Quaker Oat Squares	0.1	0.1	0.6	0.6	1.0	1.0
Oh's	0.9	1.0	0.9	1.0	0.9	1.1
Quaker Oat Bran	—	—	—	—	0.3	0.2
Crunchy Bran	0.5	0.5	0.5	0.4	0.3	0.2
Others	0.7	0.6	0.4	0.3	0.5	0.6
Total	**7.8**	**7.9**	**8.5**	**8.0**	**8.1**	**7.8**
Ralston Purina						
Chex	3.6	3.6	3.2	3.2	2.9	2.9
Almond Delight	0.7	0.7	0.6	0.6	0.5	0.5
Muesli	—	—	—	—	0.5	0.5
Cookie-Crisp	0.4	0.6	0.4	0.5	0.3	0.4
Bran News	—	—	—	—	0.2	0.1
Dinersaurs	—	—	0.5	0.6	0.1	0.1
Others	0.1	0.1	0.7	1.0	0.2	0.2
Ralston's licensed products						
Nintendo	—	—	—	—	0.4	0.5
Teenage Mutant Ninja Turtles	—	—	—	—	0.4	0.5
Ghostbusters	0.1	0.2	—	—	0.2	0.3
Morning Funnies	—	—	—	—	0.2	0.2
Barbie	—	—	—	—	0.1	0.2
Batman	—	—	—	—	0.1	0.2
Subtotal	0.3	0.6	0.5	0.6	1.5	2.0
Total	**5.5**	**6.1**	**5.4**	**5.9**	**6.1**	**6.6**
Nabisco						
Shredded Wheat	3.9	3.6	3.2	3.0	2.8	2.6
Fruit Wheats	0.7	0.7	0.8	0.7	0.6	0.6
Frosted Wheat Squares	—	—	0.5	0.5	0.6	0.6
100% Bran	0.5	0.4	0.5	0.4	0.5	0.4
Others	0.2	0.2	0.2	0.2	0.2	0.3
Total	**5.3**	**4.9**	**5.2**	**4.8**	**4.7**	**4.5**
All others	**5.4**	**3.4**	**5.3**	**3.3**	**7.8**	**5.0**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: John C. Maxwell Jr.

Kleenex bathroom tissue is ready to roll

By Laurie Freeman

Kimberly-Clark Corp. this fall will re-enter the premium bathroom tissue segment with the introduction of Kleenex bathroom tissue.

The company got out of the segment in 1984, pulling Kleenex Boutique bathroom tissue because "it didn't have the quality we wanted" to represent the Kleenex brand, said Jean Allen, director of corporate communications.

The company still markets Delsey, an economy brand with about a 1% share of the $2.9 billion bathroom tissue market.

The premium segment makes up 62% of overall market, Nielsen Marketing Research Group reported.

The new tissue will compete against the likes of Procter & Gamble Co.'s Charmin and White Cloud; James River Corp.'s Northern; and Scott Paper Co.'s Cottonelle.

Industry analysts believe Kimberly-Clark is aiming initially for an 11% share in the segment and will spend $4 million to $8 million in marketing support. Kimberly-Clark declined comment on the budget.

"What will be interesting is how James River reacts, because they are the most threatened by Kimberly," said Sherman Chao, paper industry analyst at Salomon Bros. "James River may choose to hit Kimberly in the facial tissue area if Kimberly hurts them in the bathroom tissue area."

He noted much of James River's bathroom tissue business is concentrated in the premium segment, while Scott is strong in the economy segment. P&G is the overall and premium segment leader with shares of 27% and 44%, respectively; James River has a 21% overall share and 26% in the segment; and Scott has a 23% overall and 13% segment share.

The new Kleenex bathroom tissue will be distributed initially in the south and central U.S. Advertising from Foote, Cone & Belding, Chicago, is expected to start in October. The theme of the print, TV and couponing campaign will focus on the "softness" of the new tissue, Ms. Allen said.

Industry observers earlier this year had expected Kimberly-Clark to market a bathroom tissue made of recycled paper fiber. However, "at present, only virgin fiber provides a premium softness," so the new product doesn't contain recycled paper fiber, Ms. Allen said.

The bathroom tissue, however, uses an inner core of 100% recycled cardboard, water-based inks and a plastic outer wrapper made of recycled manufacturing waste that can be recycled again, she said. □